

ORAL HISTORY INTERVIEW  
OF BRUCE PONTIOUS  
BY GEORGE PAULSON  
AUGUST 30, 2016

- Q. I'm George Paulson. I'm the interviewer, and Bruce Pontious has agreed to let us talk to him and ask him questions. And I've known Bruce for probably 25 years, and always admired him. So this will not be any kind of a grilling or anything of that type. The few things they like to get clear, for example birth date. When were you born?
- A. Birthdate is January 16, 1950, Circleville, Ohio. Just a hop, skip and a jump from Columbus.
- Q. Well, I particularly wanted Bruce because he was in Development and Fundraising and Donorship of the Medical Center, but also for the University as a whole. And I thought we had never discussed this with anybody. And it's clearly part of the University. Tell us a little bit about your career. First of all, from Circleville, how did you get up here?
- A. Good question, George. I started actually at Heidelberg College in Tiffin, Ohio, for my undergraduate degree. And I happened to be in Music. I have a Voice Performance major and a minor in Piano.
- Q. I don't think we ever knew that at the Medical Center.
- A. Probably not. It gave me an opportunity, as I've told people on a number of occasions, we had recital class every week. So you had to stand up in front of your peers every week and perform. For me, for a shy young man coming out of rural America, that was quite a shock. But I look back on it and now I realize how much that gave me an opportunity to be, in fact, oriented and not fearful of being in front of crowds and audiences.
- Q. That's probably something that happens in high school for a lot of kids and beyond.

- A. True, true.
- Q. Heidelberg was small enough that people knew one another.
- A. Right, exactly. But still intimidating when you're in front of your peers.
- Q. Particularly in performing.
- A. In performing, yes, right. So after I graduated, I did not have an education degree. So performance was my path and I was looking for opportunities. And I got approached by Heidelberg to be a part of the advancement team there. And I started out in College Admissions. I spent about four years doing admission work for Heidelberg, my alma mater, travelled all over the country, which was a great opportunity. Saw a lot of places that I probably would never have seen otherwise. And that was my first foray and introduction into development and advancement. I ended up about four years later becoming the Director of Alumni and Church Relations.
- Q. At Heidelberg.
- A. At Heidelberg, I wore many hats.
- Q. They must have liked you because they wanted you to stay on, right after you graduated, correct?
- A. True. Kind of a funny story. My boss, I actually got sick, I was in the hospital. I had Scarletina, right after being employed by Heidelberg. And I was in the hospital for two weeks and my boss actually showed up and visited me and brought me airline tickets and said, "I understand you're getting out tomorrow. Here's your airline tickets for Boston, Massachusetts. We've scheduled your high school appointments for the next two weeks." And I looked at him and I said, "Well, don't I get some training or orientation or something?" And he said, "Are you kidding me? You're just fresh off the press. You

don't need any training. You're an alum. You know Heidelberg probably better than the vast majority."

Q. Well, they must have liked you because you're genial and pleasant, but still that was an accomplishment. What did Advancement mean? You said part of Advancement. What does that mean?

A. Well it's become, it's kind of grown and morphed a bit, George, over the years. Advancement now is defined as the professions or disciplines of fundraising, alumni relations and public relations or communications. So it's all three of those together. A lot of universities or other non-profit organizations, will have departments of advancement, which is a combination of disciplines, fundraising, alumni relations. And sometimes there are other pieces that get thrown into that.

Q. It sounds like if they threw you into the lake – you can swim, just go ahead and try. You didn't have a specific mentor or somebody with you, saying, "Here's how you talk to the high school." Is that true?

A. That's correct.

Q. They just assumed you could do it.

A. They assumed I could do it. And you learn a lot pretty quickly in terms of this thing. And fortunately, I was really lucky to be able to connect with a number of alumni. That was the first thing I thought about, was who are the alums in Boston and Wooster, Mass, etc. And so I connected, I took the opportunity to connect with them. But I think that helped.

Q. So the school already had a listing of alums that you could get to the listing?

- A. Yes. But these were high school counselors, so I sometimes would talk with alums about the particular high school and what did they know, and did they know anyone there. So it gave me an opportunity to kind of network in a number of different ways.
- Q. Did you feedback more information to the alumni or to the administration?
- A. That's correct. We did both.
- Q. [Feedback such as] "Mr. Smith looks wealthy."
- A. Yeah, good point. So that was, I think, one of the reasons, George, ultimately they said, "Look, we've got an opening in Alumni [Relations]. We're going to go into a campaign." So that was really my first taste of fund raising. So when I became the Alumni Director, I also was heavily involved in the campaign for Heidelberg at that time.
- Q. How long did it take you to evolve into being the Alumni Director? From [your first] Admissions [job].
- A. I was there two years in Alumni and Church Relations. And also wore some other hats, but also did campaign work.
- Q. It has a German name. Heidelberg. Is it particularly church-oriented?
- A. It is, yes. It's church affiliated with the United Church of Christ. And there are two colleges in Ohio, Defiance and Heidelberg are both. Now it's also connected with Heidelberg, Germany. So we had a program, sort of the mother university, Heidelberg University out of Heidelberg, Germany, which I had the privilege of visiting while I was in college.
- Q. Were you involved with the religious part too, teaching or preaching or whatever?
- A. I was the Church Relations Director, so that meant I spent quite a bit of time in churches, talking about the virtues and values of higher education and the spiritual nature of a

liberal arts college, liberal arts degree, and many of those aspects. So yeah, I spent many Sunday mornings traveling to UCC churches throughout the State of Ohio. We also hosted the Ohio Conference of the United Church of Christ. They met the annual delegation from various churches.

Q. They would come there?

A. They would come to Heidelberg, right. And meet on an annual basis. I got involved in that and helping organize that, messaging, and all the politics that kind of revolved around that. There's no politics like church politics.

Q. Oh, I know.

A. And you know very well.

Q. But how did a guy who saw himself as shy in front of folks playing the piano or singing, how did you become able to ask people for money, because that was part of what you were doing too. Now that's not easy for everybody. It wasn't easy for you, either, I imagine.

A. Well, you know, I quickly realized, George, it's like so many things, even in the admissions work, counselors weren't saying necessarily no to me; they were saying no on behalf of their students or on behalf of the high school. And so I had some good mentors in the development side of things at Heidelberg. And still very good friends. Paul Yackey and Bill Goodwin were two of my early mentors. They are really responsible for me in many ways, for me having the opportunity. They were very much a part of the Music program at Heidelberg. And so they knew of my availability. And they helped me in ways that were just invaluable. I look back on that now and realize that they taught me a lot and gave me an opportunity. I fortunately didn't squander it.

Q. They gave you quite a CV. Did you go from there straight to Ohio State, or was there another stop between?

A. There was, George. There was another stop. And it was a United Church of Christ-affiliated institution. United Church Homes. And they still own five full-service retirement communities, similar to First Community Village or some of the others. Westminster Thurber is the Presbyterian one here in Columbus that you probably are familiar with. But we had five CCRC's, continuous care retirement communities. And we also built HUD projects, so housing for the elderly, rent-subsidized housing for the elderly. We had about 49 of those.

Q. Well, since I've been on the Hospital Commission for the county, I'm kind of aware of those places, but that was a door you could have opened and walked into, administering those units. But you didn't take that choice. I'm sure it was open.

A. Yes. The recruitment, George, was primarily in the development fundraising. They were starting a program for fund raising at United Church Homes and wanted me to establish that and get that growing and grow that and build that. I did that for 10 years. Our corporate office was in Upper Sandusky, Ohio, at the time.

Q. Were you there? Did you live there?

A. What I did was commute back and forth. I continued to live in Tiffin – it's 25 minutes from Tiffin to Upper Sandusky. And I just commuted back and forth every day. But they ultimately moved the corporate offices, George, to Marion, Ohio. That's where they are currently. But that also was a tremendous opportunity. I started out in Development and I ended up as a Senior Vice President for multiple areas, including marketing. We did

demographic assessments in terms of new places, new facilities, where were we going to place the new HUD project or housing project, as well as the fund raising.

Q. Well you did multiple things, and you did them well, or you wouldn't have continued to move.

A. You like to think you did them well.

Q. I'm sure people praised parts of this, but somehow, someone at Ohio State got you together with Ohio State.

A. It's true.

Q. Was that you? Did you think that you wanted to be in Columbus? Or, "I want to be in academia with a larger place"?

A. I had a taste of Ohio State and other big organizations growing up in Columbus. I was forever a Buckeye. I applied to Ohio State and back then I could get in. I couldn't get in probably today. And I had family, a lot of family, still back in Columbus and Circleville. I had gotten married at that point and we were expecting our first child. It just happened that the opportunity came along and I applied. I knew this individual at Ohio State who was in charge of hospitals; Jim Buchanan was the individual. You may remember Jim. He was the head of Development for the Medical Center at the time, which was linked primarily to the hospitals. I'll tell you an interesting story in a minute about that, which goes back to one of our good friends, [retired dean of the College of Medicine] Manny Tzagournis. But at any rate, I applied for the job and they interviewed me. Tom Tovin was the Vice President for Development at the time. And Art Broder and a number of other key people came to that interview. I ended up being the candidate of choice, and I came on board as an Assistant to Jim Buchanan in the Medical Center. And the whole

objective and desire there for me was, George, the appeal is being a part of when you're in the profession and you want to continue to move up the ladder, and Ohio State was certainly, as they say, the big time. And it was an opportunity for me to get an experience in a large institution. I had been in smaller higher education, then in health care, and all of that appealed to me. And this was an opportunity to be in both in a very big setting. And plus being at home, closer to home.

Q. You were not a man in whom ambition burns. There must have been some idealism about health care and things related to health care.

A. Absolutely, absolutely. The opportunity to be a part of, and I had heard about a lot of the services of University Hospitals and the College of Medicine. Way back when at one time I had thought and aspired that maybe I would go into medicine. And I did not do that. And that's not a regret necessarily but it was always in the heart. It was always a little bit of a burning passion, to be a part of health care. And I saw that in the elderly side of things.

Q. When you got into pretty much clearly into Development, you still dealt with people, you still had to meet. Could you hold onto some of those things that you cherished from Heidelberg? The music, the religious part? Were they still part of what you could do?

A. A very significant part. Very significant. I knew that I wasn't going to make a career in singing and performance. And I was capable. But I certainly wasn't of the high level of New York. And I didn't want to go to New York and be a starving artist. I knew that for sure. So this came an opportunity to come to a community like Columbus, which had a symphony chorus, which had very reputable choral groups, and churches, as a matter of fact, that had some fine choirs and music programs. And we found one of those in First



Community Church. The Director there is also the Director of the symphony chorus in Columbus. So I found a home there and the theology of that church as well aligned very well with me, with the United Church of Christ.

Q. An inclusive sort of feeling about religion.

A. Right, right. It's embracing and inclusiveness.

Q. But you did not go out, you weren't the one paid to come on Sunday morning to sing. You were part of the choir.

A. Volunteer choir.

Q. Volunteer work. Were you in musicals or anything like that along the way?

A. Well, I did audition for and got a part in Vaudvillities, when I first came to town. I did that for one year. But I decided that the time commitment was pretty heavy, and I couldn't juggle the whole thing. And we had a newborn – our son Ryan was born at University Hospitals. So we came to town, that transition, that all happened in the course of Denise expecting.

Q. I remember one of the tragic things in life you lost, was it Sam, that you lost?

A. Right.

Q. And that First Community was supportive to you and Denise, I imagine.

A. Very much so. And the Medical Center as well. I remember the Vice President for Development at the time was Jerry May.

Q. He was a lovely person.

A. Amazing, incredible individual. Truly. We talk about mentors. You don't get assigned mentors. You select them and that was a person I looked up to. I worked for him. I had the privilege of working for him. Like I said before, George, I had wonderful people

guiding me in the beginning. But I truly learned the depth of my profession working with Jerry May. He was an incredible professional. He made a point, after we lost Samuel in 1995, he made a point of setting up a breakfast meeting with me at least once a month for a long time. We got together and talked about, did not talk about work.

Q. Talked about life.

A. We talked about life. I'll never forget that.

Q. Well, thank you for telling me that. I'll tell Ruth, if you don't mind. It's nice to hear that about Jerry. However, when you were what I would think of as the Heidelberg missionary in Boston or wherever it was, recruiting, you taught yourself how to do things. So clearly at Ohio State, anyone who does well ends up teaching themselves some things too. What sort of things did you learn?

A. The key thing was, and one of the reasons, George, I aspired to come to Ohio State again, is kind of increasing my professional competencies and skills and capabilities. And I knew that I had not fully experienced major gift work, the ability to work with people on large gifts and the high-end philanthropists of our country and of our time. And also, in the estate planning and charitable estate planning areas. Those are two areas I really wanted to expand on. And I knew that if I came to Ohio State I would get that opportunity. Jerry and a number of other people gave me that exposure and opportunity to kind of improve my skills.

Q. And there were things you had to keep learning, I imagine, different ways people could give money or set up estates. It kept changing.

- A. It kept changing all the time. And though I was not an attorney, you had to be more than conversational with those individuals who are pretty sharp and astute. As you know, philanthropists, they don't suffer fools.
- Q. And they didn't get there from being dumb.
- A. They didn't get there from being dumb, exactly right. So we had, I'll never forget, one of the first board meetings I attended with Art James, was the titans of industry that he collected and amassed. Do you remember this board? John Walton Wolfe, Katherine Leveque, Les Wexner, of course. Jack Kessler, Jack Havens, John G. McCoy, on and on. You well remember some of those.
- Q. We did a book about [Dr. Arthur] James [founder of OSU's James Cancer Hospital], and he got those folks to go with him to Texas and look at [University of Texas MD] Anderson [Cancer Center], and then to support his dream.
- A. Right. Because it had failed the first time, as I recall, in its local efforts.
- Q. It failed several times.
- A. It failed several times.
- Q. Then he got Wolfe and Rhodes, two separate parties, behind it. But the development people can help encourage that kind of relationship.
- A. Right.
- Q. But you imply that James himself, the Joe Ryans of the world, the doctors who had to play golf with someone, they can be helpful. Was that true also?
- A. Incredibly. And I learned a great deal from the relationship-building and observing, that they already had, and the skills that they brought to the table just naturally. That helped

fine tune my awareness and abilities and skills I think, to a great extent. And working with you, quite frankly, the same way.

Q. You're sweet. But within the limits of what you could say, can you tell a story or two about people? Because there are people, and I'll tell you quickly one, of Curt's family, I went down to see, went there twice to see them in Florida. And they had endowed several chairs, one that I had and one that Sam Catland or someone had. And then the last time I was there they said, they had a very limited house. They were very proud. They paid \$14,000 for the house. And they said to me, this most wonderful man came from engineering named Glover, fine man. And he gave us a present. You cannot imagine the present. And I thought, "What in the world did he do?" A little plaque from High Street, bronze plaque, that they had put up on the wall. And that meant a great deal to them. So you dealt with that sort of thing. You had to figure out what someone would want.

A. Or if they wanted anything at all. The greatest experience I learned, George, is that the true philanthropists, truly want to make an impact. They want to make a difference. They don't want to simply manipulate things or change someone's opinion or duplicate efforts. When you asked me about a story, one of the first things that comes to mind, because you mentioned Joe Ryan, I worked with his son, Jim, a lot in Cardiology. And, of course, we were on a campaign to build a new heart hospital at the Medical Center.

Q. Yes, the Rosses helped.

A. And Libby Ross was a patient. She became a pretty high-end prospect for a major naming gift to that hospital. But her objections were pretty strong. She had some concerns about, because another hospital in the community had just opened a heart hospital. I remember distinctly, her articulating why, tell me why would we need two heart hospitals in this

community. And so Jim and I spent a lot of time talking about the pros and cons and how we would respond to that. The academic element that might differentiate us. And the importance of training – the protocols of tomorrow are developed today at academic medical centers, not necessarily completely true 100 percent, but to a large extent that's one of the true unique identifiers of academic medical centers.

Q. That could be a selling point for some people.

A. Ultimately that helped her come to the realization that, in fact, we did.

Q. When I worked at Riverside, a man named Overholzer had a wife who had a terrible neurological disease that I had been involved with. And he contacted me, met with me, wanted to give a lot of money to Riverside to do research. And I said, even though I was at Riverside, if you really want research done, you better give it to Ohio State, because that's ours to Battelle, someone like that. Because the kind of research you're talking about has to go to a big place like that. Now Riverside is a big place, but their role is not primarily research.

A. It wasn't necessary one of their primary goals.

Q. So it does matter, that kind of thing. How were relationships with people on campus? There was always a little jealousy about the Medical School. A professor of English may not like the fact that a professor of Vascular Surgery gets five times what they do. But there are other reasons for jealousy. Lack of understanding. What about your relationship?

A. Well, there was a lot of cross-pollination as you can imagine, in positive ways. And the potential for that conflict was great, because those same donors or benefactors to Engineering, for example, ended up in the hospital or in the Medical Center – as patients

of some of our physicians at OSU Medical Center. So the management of that is an important element and one of the key things that Jerry May brought to Ohio State University that wasn't necessarily there in the beginning, is what we call in our industry prospect management. It's where the professionals have to, are mandated, to communicate with each other and work with each other and figure it out. So there's a lot of time that's spent in that process, George, among professionals behind closed doors, to go through lists and not have five people contacting them.

Q. For five different programs.

A. Exactly. And Jerry was a master at that. He believed in the collaboration and cooperation and communication. It's not just a matter of agreeing to collaborate; it's agreeing to communicate, so that the right hand knows what the left hand is doing. And a lot of times before that, we didn't have that happening. That also happens with alumni, and I think that's another great achievement from Jerry's perspective and since then. Again, the alumni [association], as you know, was a very separate 501-C3 [nonprofit organization with a] very large 400,000-plus [membership] at the time. That was a big force. And we very often, even though [we're all] in the same complex sometimes ...

Q. Well, to underline this, because I doubt if anybody has spoken to it, the alumni were a separate program. Maybe Texas had something similar, but very few places had alumni offices as independent from everything else. There was a question of how to pull these together. I know Jerry May or Archie Griffin or someone could help do that.

A. Gordon Gee, ultimately, in his 14<sup>th</sup> [year] as President, was the architect for bringing that together.

Q. Oh, that's interesting.

- A. It became an Office of Advancement, which it is now under Mike Eicher – he is the current Senior Vice President for Advancement, as I understand. That includes Alumni. It includes Communications.
- Q. They may still arrange a trip or something like that. But it's still somehow, since it is identified at OSU, you can't have it do something, they're not running a pornography trip somewhere.
- A. That's right.
- Q. As part of Ohio State. And should be.
- A. So there's high level oversight, which I think is important.
- Q. Now I want to come back to that, but also it sounds like the business, the profession, whatever the label is now, now has like many professions, sort of guidelines of who you are, code of behavior. They probably have journals. Is that true of Development? If Cardiology begins, a couple say we're now cardiologists? And then you have the journal. Then they say you have to take an exam to be part of it. Does the same thing apply to Development?
- A. It is true, yeah. And has continued, George, to kind of enhance and improve its credential if you will, crystalizing. Code of ethics. Which has always been there, but now it's more concrete and clear. Something that all credible programs aspire to and subscribe to, in terms of the manner in which their professionals behave and the code of conduct. But also, I think you bring up a good point in terms of the independence of development. I think development sort of led the way. Fund raising sort of led the way in building the bridges to alumni relations and communications in a broad sense. There wasn't kind of the same aspiration to say, "Oh let's get the development people to be part of alumni

relations. Or let's get the development people to be a part of communications. I think it was more the development fund-raising profession that saw the benefits of those bridges between those, and ultimately the collaboration that became the advancement profession. That was kind of exciting to be part of. And I saw that happen, George, in Council for the Advancement and Support of Education [CASE] case, which was a big conglomerate, over-arching professional organization for higher education, and independent schools as well. Not just colleges and universities but also independent high schools and others. So that was a platform and that was an incubator, if you will, that allowed those disciplines to begin to work together, to make presentations together, to collaborate. And I think Case did a lot to foster that and make that grow to where it is today.

Q. It's not automatic and all the people have to benefit or it doesn't work.

A. Right.

Q. You can't have an isolated – the advancement people, they also have to deal with the Gordon Gees of the world. And most of it is going to be positive, but surely you dealt a lot with various hierarchy within the University. And not everybody is like a Manuel Tzagournis, and you could undoubtedly like him and he could like you, and you could trust one another. Have you had that pretty good relationship up and down the ladder?

A. I have been blessed. I really have, in a lot of ways, to be exposed to what I think are some of the finest, some of the greatest, leaders in Ohio State's time quite honestly.

Q. Manuel was not at all averse to calling one of his legislator friends and try to help them, first of all. And then secondly, [ask them,] "Can you do something about something?" He didn't object to doing that. But a lot of folks can't do that as well. He is one step beyond that in his behavior.



- A. Gordon was one of the most incredible leaders I've ever had the privilege of working with. Just a remarkable individual in many ways, not only his vision but his work ethic, just so many things. I was at an event at Ohio State in the 11<sup>th</sup> [year of his] presidency, we were down in Florida, and an interesting story, but you know this about Gordon. He had a gift and that was his memory. And he rarely ever forgot anyone's name or something about the last conversation he had with you.
- Q. That's right. He was remarkable. But he had to have worked at that when he was younger but he still had a gift.
- A. He must have. But I think it truly was a gift in many ways, and he knew that. But I was sitting at a table of benefactors – pretty large and high-end benefactors – and this lady was lamenting about how she had worked and worked the Sunday New York Times crossword puzzle for years and years and years. And all of a sudden she missed one. She couldn't get this one. And I said, "What was it?" And she told me. And I went over to Gordon and I knelt down beside him and I said, "Gordon, do you happen to remember 44 down?" And he looked at me like, "Well, of course you idiot. Of course, I remember." And he gave me it like that. He gave me the word. And I went back and she was just amazed.
- Q. He was astounding when he was teaching a course. There would be 28 students and he knew a large percentage of names. He never failed to know who I was. Never failed to remember what my association was. There's no way I could do the same with the students. And he took pleasure in doing it.
- A. He had such a devotion to students and to their education, their higher education.
- Q. It's hard to get angry at a leader who clearly is devoted to the students.

- A. Exactly. And as you know, some people might characterize that, I suppose, as antics and seeking notoriety and publicity, a publicity hound sometimes he was called. But truly the motives were deep-seated in his heart, to ensure that students were going to advance themselves. The Horatio Alger kind of story.
- Q. You left here, though. I was surprised and disappointed when you left. And you didn't leave, as far as I know, with any angry feelings behind or any bridges burned. People said thank you very much, but you left.
- A. In the course of things, when you're at a place for almost 22 years, one of the very first people I met happened to work in Development and became a very close friend, like a brother to me. He left about four years later and went to Penn State University and worked for a guy named Dave Gearhart, who was the Vice President at the time, of Penn State. And Dave grew up in Arkansas. He ultimately went back to Arkansas, the University of Arkansas. And my friend went on to a couple of other places. Dave ultimately recruited him for a big campaign that he was planning in Arkansas. And they both called me and said, "We need you on the team." I said, "You've got to be kidding? I'm going to retire from Ohio State in 4-5 years. I can't sign up for another 8-10 years." And so one thing led to another and those were offers you couldn't refuse.
- Q. Oh good.
- A. We moved to Arkansas. I told him I would – in private, behind the scenes – I said, "I'll give you five years." And that's exactly what we did. We spent five years there. Had a wonderful experience, met some wonderful people. A college community. Bentonville is the home of Walmart, so that was another attraction for me. It was an opportunity to work with the Walton family, which I did. And Jim Walton was on a number of boards at the

University of Arkansas. He runs the bank that they own, which is Arvest. Alice, the daughter of Sam, brother Jim, came back to Bentonville and built one of the most stunning museums of American art in this country. Crystal Bridges. So we went to see that and be a part of that in some way. But it was just, overall it was an incredible experience, a really good experience.

Q. Just mechanically, can you move your retirement? Did you lose everything you had here?

A. Well, fortunately Ohio State and the Ohio Public Employees Retirement System, that was all intact.

Q. That part worked out okay. I shouldn't have even asked, but I couldn't help but think about it. What a sacrifice you made.

A. You think about all those things before you make the decision to go.

Q. Because you had friends here, you had family here.

A. Exactly.

Q. What did you learn that was different? I know you were involved with the big names there. But within the school, how was it different? How could Ohio State have learned something from Arkansas?

A. That's a good question. There are two parts. One, I had greater responsibility than I ever had before. I was in charge of all development for the University. Essentially, I was the Vice President.

Q. So you had like the main job here would have been?

A. Correct. Not as big. Arkansas at the time was 19,000-20,000 students.

Q. But the role was as big.

- A. The role was as big. And I had 70, roughly 70 people, development professionals. About 114 altogether. But about 70 professions working for me.
- Q. Professional means they are a part of Advancement.
- A. They were fund raisers. They were development. Just fund raisers.
- Q. I mean, I know what Neurology organizations are. I have no idea about that. So we're all learning about it from what you tell us.
- A. There was an alumni counterpart to myself, and also a communications counterpart. It was truly an advancement operation, and I was the development or fund-raising component of it. So you know, I think in many ways, George, there are a lot of similarities. I could probably say in the time there I met [the counterparts to] Libby Ross, I met John G. McCoy, I met Dick Solove. They were just in Fayetteville, Arkansas. Still really altruistic, philanthropist. They made money and they wanted to do something good with it. Wanted to make an impact on other people's lives. And I still have fond relationships and communications with many of them in Arkansas. In fact, we're headed down. I just got off the phone with one of our large benefactors there who we have stayed in touch with and have a friendship. It's not just about a job.
- Q. You mentioned gifts. You have a gift, that people like you and trust you, and you're easy to like. You pick up friendships quickly. I'm sure that matters in development. It matters in anything. But I'm sure it matters supervising 130 or however many people.
- A. There are key things that I look for in successful development over the time I've mentored a few people. And as well, George, I think you've hit upon some of the key things that I look for. It's not a sales job at all in my estimation. It's really relationship building and building trust. It's about building a high level of trust. And that requires a lot

more than talking. God gave you two ears for a reason and one mouth for a reason, as the old saying goes. Those active listening skills and the ability to simulate a lot of that. And understand what the passion of that person is and have the ability to try and bring that to the forefront.

Q. That's beautifully phrased, but you also dealt with the thing that you deal with in medicine, you assume they may know something. You may have someone who knows everything about the opera but has zero understanding about the heart. And you have to deal with people, they really look to you for some counsel about what's possible, because they don't know. They don't know what the University has. And they don't know which philanthropy thing is the best. I think pretty quick to figure out, but they need someone to guide them. That's what you saw that as. You could pretty well tell fairly soon whether it was likely to be useful from the University. You didn't ever tell anybody you wouldn't talk to them. But you probably knew fairly quickly, this one will be, easy is the wrong word, but this one is going to be easy to cooperate with, just like within the other field.

A. And sometimes there are other factors too, George, and I remember one particular benefactor who we will see when we're down there. He had done amazing things for the University of Arkansas, but developed some bad relationships. So it was a tougher challenge to get him to look again at the University. But I didn't give up on that because I could see that his heart was in the right place. There were other barriers to getting back to the University ultimately.

Q. Well, I say things I shouldn't say but I don't think anything derisive, but I liked Dick Denman and I saw him several times. Manny had me see him. His son had a neurological problem.

A. Epilepsy.

Q. Spent a lot of time talking about that. And so he gave some money to Neurology and was going to give more. But the epileptologist in the department was difficult to deal with, at best. And the philanthropist wasn't going to deal with it. So he was maybe not going to give anything to the University because of that relationship. I'm sure that's happened more than once.

A. It has, it has. But you do your best to try and look at the positive stuff, the things that happened. There was an interesting analysis done, George, of the UCLA campaign, \$3 billion campaign, which has been closed, finished, for a number of years now. They did an in-depth analysis of the top 20 donors, to that campaign. That was a \$3 billion campaign. Twenty of their donors gave \$1 billion of that. One-third of that came from 20 donors. And I use this illustration in a lot of classes in training. And I ask the question, of those 20 donors, what do you think their average gift, first gift was, to UCLA? And the average gift for those 20 was \$200. And how many places at UCLA do you think those 20 donors have given over their lifetime? And generally, people will think of one or two. The average was 11. Eleven different programs at UCLA. We kind of compartmentalized people, in that we found their passion and it's the only thing, Cardiology, Neurology, Epileptology, but we forget that they're married and they have children, grandchildren – all of these life experiences motivated them to develop new passions and new interests. I think the greatest disappointment I've seen, frankly, in the profession, my profession, George, is that we have such turnover, such high rates of turnover. In development, the average I think now is close to 22 months. A Development Officer comes to an organization and moves on. Barely with an opportunity to develop the kind of

relationship, long-term relationships, that I think are critical to uncovering and being able to follow and develop, not only the trust level but also the passion and the interest of benefactors in this country.

Q. That's a good point that I didn't know quite how to bring up. One of the strengths you had, you were here long enough, that people got to know you and trust you. And I don't quite understand, it's a little bit like folks who are, well, I see it working with the Opera Board. I see it working with the other people. Development people are not there longer than a year or so. They say, "We will do this and this," then they move to another position. Is the job that fragile? Are the people that fickle? What accounts for that?

A. You've touched upon some really good points. It's a combination of things, I think multiple things, George. I think sometimes that turnover is a product of their own, the professional's aspiration to move up the ladder. And the only way they can see themselves moving up the ladder is to move. I've worked hard in my career to establish career paths for people without, number one, supervising people. We shoot ourselves in the foot as a profession all the time, by advancing people to supervise someone else when they have no skills. And we've not trained them. And what they do well is fund raising. And we all of a sudden move them up the ladder. And then they've got two or three people reporting to them. Well, guess what suffers? What suffers is both the fund raising and the supervision.

Q. It's like making the best teacher the superintendent.

A. The good basketball players don't always make good basketball coaches. So that's a part of it I think. The other part is, I think, volunteer boards. And volunteer boards oftentimes are put together for a myriad of really good reasons but oftentimes the core, primary

reason, isn't their knowledge and skill in fund raising and development. And yet they are charged with supervising that area to a large extent. And that can be a mixed review. And sometimes the professional is just up against some significant obstacles.

Q. They may be up against the person on the board who thinks they invented whatever the disorder is.

A. Exactly.

Q. That happens.

A. So you get very passionate people that are on a medical board or a volunteer medical board, as you established in Parkinson's, for example. I think of George Batton. I think of a variety of people.

Q. How did you continue to learn? You learned by doing. You learned by teaching. You learned by making mistakes because we all do. But is there a formal educational process, do you take exams? Not you, but junior to you.

A. Yeah. I think there are a couple of answers. One is, some of the professional organizations that I mentioned earlier, and there are many others, that I've had the privilege to be part of, are great environments for nurturing and learning and networking. I had, CASE was a good example, and I presented at many of those CASE conferences. There's the National Association for Hospital Development. One of the most significant for me frankly was an unofficial group that's called the Unnamed Society. And it's an interesting name. But it's by invitation only. [People who work for] the largest academic medical center in the country, have an unofficial group that gets together twice a year. And somebody hosts it at different academic medical centers, like Duke or Johns Hopkins or UCA, USC, etc. I got invited to that early on and the only people that attend



are the high-end leadership of that organization, in development. You've got to sit with the Jerry Mays.

Q. At Arkansas, they still let you come?

A. Yes. But this was Ohio State, because I was not in medical at Arkansas. The medical, as you may know, is in Little Rock. And they are totally separate campuses and totally separate operations and presidencies, etc.

Q. That's a very good answer.

A. But Ohio State one gave me an opportunity to really get to the high level and talk with some of the leadership and understand some of the issues. Retention of staff, for example. It was always on the agenda. How do we keep good people? Performance evaluation. How do you create and incentivize your development staff and professionals. Just ethical issues, a whole variety of things that I probably wouldn't have had the opportunity. You can't read it in a book. It's not quite the same as sitting down with people who have experienced it. So that was a blessing along the way, George, and I think, again, just working for amazing and incredible people like Jerry.

Q. Going back to here again, I almost got obsessed at times in my life about the conflicts or the potential for relationships between Riverside and OSU. Riverside to me was the largest animal in the room. Was there anything done with their development, not like Ohio State, but they've done very well. Was there ever any interchange locally? Sometimes local people develop, people will meet together. That happens too?

A. That does. Not as formally, George, as described in some other scenarios. But it could in some of those organizations. There are opportunities. AFP, which is the Association of Fundraising Professionals. And some of the Riverside folks and Ohio State folks have

been a part of it as well. But it was more informal, most of the time. I've hired a number of professionals from Riverside over the years. And likewise, they've taken people from me. But you know, it's been more of a mutual collaboration.

Q. That's what most of it has been, despite how it started.

A. And you know, I was again, fortunate, I would consider you one of my mentors frankly. You helped me in many ways that you may not know. But that very issue of, I can see you as a physician straddling both of those fences. And there were other physicians who, it's either/or. And it was a line of demarcation.

Q. It was amazing that we had so many trained at Ohio State, and then after they left Ohio State, said, "I'll never go there again," and then they didn't accept [tickets] for football games. They had zero interest.

A. And that was a shame, because there was such great opportunity as you pointed out.

Q. And you mentioned Tzagournis. He was a person that you found. What sort of person within administration? You mentioned Jerry May. What were the characteristics? Jerry May was human to you. When friendship was valuable, he was there. What were the qualities of the ones you found particularly useful?

A. That was true of Manny as well, as you know. Very human individual person who took interest in you and your family. It wasn't lip service; he truly was interested and meant that. He was extremely helpful when we lost our son to SIDS. Manny was helpful in guiding us to some answers, as many answers as you can possibly have under that situation. And then along the way, just taking an interest in my family. And I in his. So we've continued that relationship.

- Q. I've got to ask a couple of things. I haven't gone through this list yet. But tell me how you met Denise? Because she's an admiral woman. You said you married up. It was a good thing anyway.
- A. It was one of the most amazing things that happened to me, a real blessing. As many people, once they meet Denise, the next words are, "I can see that you over-married." We met at my brother's wedding, actually. And she is younger than I, so she was friends of my sister-in-law. And so we spent some time together. But she was from Circleville as well. She's an identical twin. Red-head twins, born on their father's birthday, by the way, which is coming up September 3. The other twin lives out in California and is coming in.
- Q. Did the other twin have a good life too? So far?
- A. Absolutely, yeah.
- Q. So they were good solid citizens all along. But you never knew them in Circleville?
- A. Did not. Like I said, I had left and she was younger. But Denise is an incredible partner, life partner, wife, spouse, friend, best friend, confidante, all those things. Wonderful mom.
- Q. Did she have some of the same musical skills that you have?
- A. Well, she enjoys, appreciates music, but not gifted with singing. So I've dragged her to too many of those things. She is a country-western fan, so I find myself going to country-western performances.
- Q. And some of it is good.
- A. Yeah, yeah. So we've had a great life together. Just celebrated 34 years.
- Q. Congratulations.
- A. August 28.

- Q. I don't see that those who have had two or three pretty wives than those of us that stayed with somebody for a while. And you met her at the wedding. How long did it take you to realize you wanted to marry this woman?
- A. For me, it was almost immediately. It was one of the things.
- Q. I can believe it because it happened to me. It does happen occasionally. So you felt this might be the one?
- A. This might be the one. I was 32 years old.
- Q. That's not old.
- A. At any rate we dated for about a year. And then a year and half got married.
- Q. She probably had some skills in something or was trained in something. She's a bright woman. What was her field?
- A. She has been mostly in the banking industry. She worked in banks in Tiffin, when we were in Tiffin. She worked in one of the local, not big conglomerates, but a local bank. Did a lot of that as well as education. When we were here in Columbus, she spent most of her time in the Upper Arlington school system. She now works for Worthington school system.
- Q. She's still busy.
- A. Still busy. Still working. She wants to continue doing that.
- Q. How did she tolerate the social things that you had to do? She did well with that, I imagine.
- A. That's again why she was just the perfect partner. She is very warm, very easy to talk to, as you know.

- Q. Were you ever tempted to link up permanently with something like a Walton family? I assume some of these very large people not only have philanthropy but they have people organizing their philanthropy. Did that ever appeal to you as a potential career?
- A. I was offered some of those opportunities but to be honest, George, my heart was in the other side of it, in helping those with resources to connect them and facilitate, not necessarily find worthy charities, which is the job that you end up having. I had an opportunity with the Columbus Foundation, for example, and another local. But it was just for me, being able to be a part of the other side of it.
- Q. I'm not trying to over-emphasize it but we tend to under-emphasize the role of religious beliefs. And I suspect that partly played in a role in what you've done. This seemed a better thing, something you could do more good in. I'm not trying to belabor it, but am I correct about that?
- A. You're absolutely right.
- Q. I wanted to say it because then they would think that can't be true, he's a hypocrite.
- A. The altruistic part of it, the health care in particular, really resonated with me in my core, my values, my interests.
- Q. Is there anything on your list there?
- A. No, you really did a great job. As I've said before, I'm delighted that you and I have had the opportunity to maintain communication and friendship.
- Q. We'll end up with one other thing: you mentioned the Rosses but of the different people who have given, leaving aside whether it was a million or half a million or whatever, are there any that stick in your mind as human beings that are worth mentioning? Because

they may never be mentioned in the record here. The names are taken off the buildings and are forgotten.

A. Yeah. There are several. I'd be afraid of omitting some but some of the ones that jump to my mind, I've mentioned a couple before, George. John G. McCoy was just one of the most amazing philanthropists. And good friends with Libby Ross.

Q. He's not just given to Ohio State; he's given to multiple places.

A. All over, exactly. And Marty Morehouse, the Morehouse Plaza. I worked with Marty on that gift.

Q. I often wondered how that name came.

A. Martha Morehouse, whose father was Max Morehouse and one of the early commercial vendors here in Columbus. Morehouse Fashion downtown, which became the Union, down on the corner. He was one of the first merchants in the country to fly goods to Columbus, Ohio, from Cleveland, Ohio. I saw the correspondence, which was just amazing, of the two. The Wright Brothers corresponding with them as to how.

Q. So the way in which they got the money was interesting, too.

A. Amazing, incredible.

Q. Something somebody else hadn't done.

A. Right. So truly entrepreneurial spirits. But Marty was just a very unique person, very close to Ron Wistler in the Medical Center, when he was here. Immunologist, she had lots of health issues. Jack \_\_\_\_\_.

Q. Of course, they've been involved here with the hospitals, more than one hospital too.

A. Right. Shirley Bowser. Do you remember Shirley?

Q. Certainly. I remember the blood clot she had.

- A. And Cliff, her husband who just recently passed away.
- Q. She was upset at Ohio State because they wouldn't admit everybody, some of the farm kids whose grades weren't good enough to get in. But she was wonderful. I think we probably better quit, but you've done a wonderful job and I appreciate it. You did a wonderful job before. Thank you for taking the time.
- A. I'm happy to. It's been a pleasure spending time with you.
- Q. And I bet your family will enjoy having it in the files somewhere.
- A. I've gained so much more from working at Ohio State than I've ever given back. And I'll forever be grateful for that.
- Q. And any of the things that were slightly dark they can stay in the closet. Thank you very much.
- A. Thanks.